



## Cleveland County Health Department Shares Proven Best Practices for a Successful Public Health EHR Implementation

### BACKGROUND

As with all public health departments, Cleveland County was faced with the task of finding a usable and affordable EHR system. The team at Cleveland County Health Department (CCHD) wanted it done right to avoid the usual pitfalls of adopting a new system. Old habits die hard, as they say, but Alisa Leonard, Director of Nursing CCHD had more in mind. "The Federal and CMS regulations and incentives were what originally prompted us to look into purchasing an Electronic Health Record, but the opportunity to make clinics and patient care more consistent and efficient played a big role as well."

CCHD collaborated with the Charlotte AHEC's Healthcare Information Technology Regional Extension Center and Quality department for technical assistance with EHR selection and the meaningful use navigation processes. A well-planned step-by-step process led CCHD to a successful implementation.

### CHALLENGE

Cleveland County Health Department serves a population of over 97,000 people, concentrated in the three largest municipalities of Shelby, Kings Mountain, and Boiling Springs, leaving the northern end of the county very rural. The health department serves this population through their 20 specific clinics, including Child Health, Maternal Health, STD, TB, Family Planning, etc. The staff was still completing clinical documentation the old fashioned way, on paper. Tracking down paper records is time consuming and frustrating for staff. "Everyone knew that this would be a huge change for the entire health department and change is not always welcomed with open arms" said Kim Crane, RN Communicable Disease & Prevention CCHD. So there was a lot of planning that had to be done to ensure a smooth transition.



### CCHD's Benefits of Patagonia Health EHR

- Improved continuity of care
- Increased efficiencies in clinics
- Enhanced and increased billing
- Quick, easy and comprehensive reports
- Eliminates duplicate data entry
- Innovative Apps take department to the next level
- Responsive, organized, & thorough training & support



Watch full video at <https://www.youtube.com/watch?v=evHW8ITz9ag>





## SOLUTION

To best prepare for the change from paper to EHR, CCHD formed two critical teams: an Implementation Team, to make high level decisions regarding implementation, training, workflows, etc., and a Super Users group to provide support to front line staff and relay any messages or concerns to the Implementation Team.

There would ultimately be more than 125 users of the new system so the Implementation Team looked at every step in detail. This included conducting an in-depth workflow analysis of all clinical and clerical areas. This analysis allowed CCHD to make necessary adjustments prior to go-live so staff would have time to become familiar with the adjustments, and better integrate the EHR into their daily activities. To better prepare the staff, each of the users' computer skill levels were evaluated through a Computer Skills Assessment Survey provided by Charlotte AHEC and on-line training courses were offered as needed.

The implementation team researched EHR systems on the market. To meet CCHD's needs, EHR vendors with public health functionality (and success with local health departments) were invited for on-site demonstration. CCHD then used an EHR Vendor Selection Matrix also provided by Charlotte AHEC. The rating areas of the matrix included functionality, user-friendliness, daily workflows, technical support and pricing. The teams discussed pros and cons, rated each area for each vendor. "We encouraged all available staff to attend the demos since essentially they would be the end users of the system and we wanted them to be a part of the selection process" Crane stated. To learn more, they then began visiting neighboring counties, including Wilkes and Watauga County Health Departments, who are both Patagonia Health EHR users.

CCHD Administration agreed that Patagonia Health would meet their needs in retrieving data and improve billing, and the staff found the EHR to be very user-friendly. "We chose Patagonia Health because it was the number one choice among our staff" said Crane. The Implementation Team included the staff throughout the selection and implementation process to keep morale up and to keep staff updated throughout the entire project. Crane added "I think



*"The Federal and CMS regulations and incentives were what originally prompted us to look into purchasing an Electronic Health Record, but the opportunity to make clinics and patient care more consistent and efficient played a big role as well."*

*Alisa Leonard, RN, BSN,  
MPH  
Director of Nursing*



the biggest morale booster for us was communication and continuously encouraging staff that, yes, you can do this and we are going to get through this together!”

Patagonia Health EHR is a cloud and apps-based software solution, which required little IT support to get CCHD up and running quickly. Customizations, such as condensing four encounter forms into one, were made by Patagonia Health to better meet CCHD’s needs, and quick-guides, provided by Patagonia Health, were modified by CCHD to be even more specific. Cheat sheets were developed specifically for common clerical and clinical functions. In addition to the EHR system, CCHD also purchased the School Health App, Management Dashboard App, Communicator App, and later the GIS Health Mapping App.

Extensive group trainings were held to promote communication and collaboration, utilizing test patients for teams to work through all possible scenarios of their clinic. “Patagonia Health’s support and training has been very organized and thorough. They are always very responsive to any request or issues that we have sent them” said Leonard. Throughout the process, Patagonia Health staff advised on how to improve and optimize workflow. Patagonia Health was on-site during go live to help with the transition. Internally, CCHD staff communicated through walkie-talkies during go live and posted notices to inform patients, in case there were any issues or slowdowns. “It’s been so smooth for our staff. We had worries that it would be very complicated and slowdown the processes but it has been a very smooth transition” said Crane.

## BENEFITS

CCHD has improved the continuity of care because of the improved accessibility of information. By using Patagonia Health EHR, tracking down a paper chart is no longer time consuming or frustrating; with the electronic health record, clerical staff’s time spent pulling charts has decreased substantially and there is no paper clutter of loose documents. “When a physician calls from another facility, everything is there. I don’t have to go looking for a chart or put them on hold for five minutes, I’ve got everything at the click of a button” said Janet Houser, RN, PHN Supervisor II Maternity Clinic CCHD “and letters and referral forms are so easy to



**Super Users Group:** Back Left to right: Tammy Griffin, Kim Crane, Debra Bidy, Linda Kiser, Alisa Leonard, Janet Houser, Michele Taylor, Jennifer Ladd, and Lauren Link Front: Heather Willis, Jill Cogdill, Tammy Cobb, and Clarissa Hall



*“We chose Patagonia Health because it was the number one choice among our staff.*

*It’s been so smooth for our staff. We had worries that it would be very complicated and slow-down the processes but it has been a very smooth transition.”*

**Kim Crane, RN**  
*Communicable Disease & Prevention*



transmit directly from the EHR system.” Immunization and communicable disease (including TB) is so much easier with the EHR.

“Given that we have implemented Patagonia Health only 8 months ago, we have already seen increased efficiencies in clinics” said Leonard. The Appointment widget on the Dashboard has been very helpful for management to get real-time knowledge of clinic flow. The ePrescription feature has decreased the amount of time it takes to maintain a patient’s medications list and allows the ability to set up the provider’s most commonly used pharmacies. CCHD can also now interface with outside labs to obtain lab results in a timelier manner. “If you ask any nurse in the maternity clinic the best thing about the EHR, it is that all our state forms are preloaded” said Houser.

Improving data collections and billing capabilities was another added benefit for CCHD. With over 2000 payers available in the Patagonia Health billing system, Tammy Griffin, Billing Specialist CCHD, commented “One of the biggest advantages is the clearinghouse and being able to funnel all the claims to just one location. Previously we had to submit them to multiple places.”

The accessibility of data has also improved departmental efficiencies. All patient data is in the same system and can be accessed from anywhere, any time. Customizable reports can be run any time to help CCHD learn more about the goings on at the health department and within their population. CCHD can quickly and easily send detailed reports to the Health Commissioner or Board of Health upon request.

Since inception of Patagonia Health, CCHD’s Implementation Team continues to serve as the initial point of contact. “The implementation team felt that communication, accountability and determination were our biggest key factors” said Lauren Link, MBA, Nursing Director’s Assistant & EHR Project Manager. As best practices are vital, CCHD has established policies and protocols for their EHR usage. The Implementation team and Super Users group continue to meet regularly, audit their workflow, and work with Patagonia Health for support and system updates.

CCHD is also an active participant in the Clinical User Group to continue to enhance the EHR for all health departments.



*“We implemented Patagonia Health only 8 months ago and we have already seen increased efficiencies in clinics”*

**Alisa Leonard, RN, BSN, MPH** Director of Nursing



**Alisa Leonard** RN, BSN, MPH  
Director of Nursing &  
Implementation Team Member



**Lauren Link, MBA**  
Nursing Director’s Administrative  
Assistant & EHR Project Manager

### **Patagonia Health Inc.**

15100 Weston Parkway, Ste 204  
Cary, NC 27513

Email: [info@patagoniahealth.com](mailto:info@patagoniahealth.com)

Phone: (919) 238-4780

Fax: (919) 238-7920

Web: [www.patagoniahealth.com](http://www.patagoniahealth.com)

Rev 032017